The Organic Food Market in France

March 2000

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Market Research Centre
March 2000

THE ORGANIC FOOD MARKET IN FRANCE

Team Canada Inc · Équipe Canada inc

EXECUTIVE SUMMARY

France is among the world's largest consumers of organic foods. In 1998, sales of organic food totalled approximately $1 billion[1], a 46% increase over the previous year. Although organic foods currently account for only 1% of total retail food sales, by 2003, sales are forecast to exceed $3.5 billion.

Health concerns combined with recent food scares have spurred on the growth of the organic food market, which has been increasing by 20-30% annually in recent years. Despite this healthy sales growth, the comparatively high price of organic foods remains an obstacle to widespread consumer acceptance. As organic foods become more consistently available and gain more exposure (through increased sales in large retail chains), prices will become increasingly comparable to conventional foods and organic foods will steadily gain a larger market share.

While transportation times, high transportation costs and duties may make some organic foods impossible to ship to the French market (especially fresh products), the popularity of frozen and consumer-ready organic products is steadily growing and may present good opportunities for Canadian exporters.

[1] All dollar amounts are in Canadian funds unless otherwise stated.

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MARKET OVERVIEW

France represents one of Europe's largest markets for organic food, although the market is still developing. French consumers of organic food tend to be professionals over the age of 25, with above average incomes. Although organic products tend to be more expensive than similar conventional foods, the health benefits and taste of organic foods are typically cited as justification for premium-priced organic foods.

In 1998, French sales of organic food totalled nearly $1 billion. Although organic food sales account for less than 1% of total retail food sales, organic food sales have increased by 20-30% annually (including a 46% growth in 1998) in recent years. Sales are forecast to exceed $3.5 billion (or 3% of total retail food sales) by 2003.

Whereas the United Kingdom (U.K.) and Germany have established organic food markets, the French market is still developing. Currently, French production of organic food is unable to meet the growing demand for these products. As a result, France imports approximately 30 000 tonnes of organic foods annually. However, in an effort to remain competitive in this growing market, the French government has introduced significant initiatives into this sector to increase both production and distribution of organic products.

Key Factors Shaping Market Growth

Health concerns are the primary reason behind the steady increase in organic food sales. While the overwhelming majority of French consumers cite health concerns as the main reason for organic food purchases, a recent survey of 1000 consumers found that 59% believed that organic foods are a passing trend that will have little effect on long-term eating habits. However, sales of organic foods continue to show strong growth with no decrease anticipated for the foreseeable future.

Recent food scares throughout the European Union (EU) have also helped increase organic food sales. In August 1999, the French government announced that run-off from waste water and septic tanks from animal processing sites had been discovered in pig and chicken feed. This announcement, combined with the Bovine Spongiform Encephalopathy (BSE) scare in Britain and the Belgian discovery of animal feed contaminated by dioxins (which are known to cause cancer), led growing numbers of consumers to purchase foods that are produced by natural means.

Among the major obstacles to the growth of organic food consumption, price remains the greatest hindrance. Organic foods typically charge prices that are 20-100% higher than similar conventional foods, with some organic foods charging even higher prices. As the numbers of organic producers and products that supermarkets carry increase, prices should decrease, thereby making organic foods affordable to a greater percentage of the French population.

Other factors hindering the growth of organic food sales include a lack of conformity and recognition of organic symbols throughout the EU, a lack of consistent supply of organic products, little to no advertising for organic foods, and the need for wider exposure in large retailers.

Opportunities

Historically, raw goods, such as wheat, have accounted for the vast majority of Canadian organic food exports. However, as the market for organic foods continues to grow, opportunities for exports of consumer-ready products have also increased. Canada's reputation as being a clean, environmentally conscious country should also help exporters of organic foods.

The largest sectors within the consumer-ready, organic food market are:

Produce

Fresh produce sales account for 40% of total organic food sales, exceeding $400 million annually. The majority of fresh produce sales are through open air markets, direct from the farm, and through health food outlets. Supermarkets and hypermarkets have traditionally focussed on selling dried and processed organic foods, although the large retailers are steadily increasing the number of fresh products that they offer. In the future, large retailers should show the strongest growth in fresh produce sales.

The greatest obstacle for increasing fresh produce sales is the lack of steady supplies. Although France imports some organic vegetables in order to make up for domestic shortfalls, many products remain in short supply. Due to the transportation times associated with exporting to France, Canadian exporters will only be able to compete in areas where vegetable products have a comparatively long shelf life.

Bakery/Cereal Products

Bread accounts for the largest share of sales in this sector. In 1997, bread sales exceeded $185 million. Other popular bakery and cereal products include biscuits, breakfast cereals, pasta, and rice.

While the majority of bakery and cereal products are sold through supermarkets, organic breads are sold primarily through the 4000 to 5000 organic bakeries. Biofournil is the dominant specialist organic baker while retailers such as Carrefour and La Vie Claire have also begun selling their own lines of organic breads.

Dairy Products

In 1997, sales of dairy products were estimated to be worth $47 million. Organic milk sales account for approximately 60% of this market with sales doubling in one year, from 3.5 million litres in 1996 to 7 million litres in 1997. Yogurt is the most popular organic dairy product, aside from milk, with annual sales of $10 million. Fresh cheese and cream are also extremely popular, with sales of $3.7 million and $1.9 million respectively.

Meats

Recent food safety issues such as the BSE crisis in the U.K., the foot and mouth outbreak in the Netherlands, and swine fever in Germany have helped spur on the growth of the organic meats market throughout the EU. In France, demand is significantly higher than supply and as a result, retailers are often out of stock of organic meats.

The poultry market is the most developed meat sector with roughly 170 000 free-range chickens being produced every month. Beef is also quite popular, due to its comparatively low cost. The most significant obstacle for the growth of this market is price, as organic meats tend to be 30-40% more expensive than conventional products.

Actual and Planned Projects

In December 1997, the French government announced that it planned to invest approximately $15.4 million into the domestic industry in order to increase and improve organic food production and distribution. France hopes that, by 2010, this program will enable it to become one of the largest organic food producers in the world. The Ministry of Agriculture and Fisheries estimates that within 10 years the number of organic farmers will increase from 4000 to 25 000, the total organic farm acreage will exceed one million hectares, and sales of organic foods will increase from 0.5% to between 3% and 4% of total retail food sales.

COMPETITIVE ENVIRONMENT

Local Capabilities

In 1985, France was Europe's largest organic food producer. While the French industry grew substantially in the 1990s – to 6500 farms (up 36% from 1997) covering 142 300 hectares of land (compared to 82 000 hectares in 1995) –, by 1998 France fell to sixth position in the EU market. The vast majority of organic farms are located in southern France, with only a few farms in the Northwest.

France has roughly 700 processors and distributors of organic foods. While the number of processors has steadily increased, in response to the growth of the market as a whole, the French organic food industry is still considered to be fairly concentrated compared to other EU countries. The largest supplier of organic foods is Distriborg, with annual sales exceeding $165 million. Distriborg has a large number of subsidiary companies, and produces the widely recognised Bjorg and La Vie brand products.

International Competition

Although the amount of land devoted to organic farming in the EU is still fairly minimal (2% of total land area), there has been a significant growth in the number of organic farms over the last 15 years. In 1985, the EU had only 6300 organic farms. However, subsidies introduced in the 1992 Common Agricultural Policy (CAP) reform package encouraged large numbers of farmers to switch to organic farming methods. In 1998, the EU was estimated to have over 100 000 organic farms, representing an average annual growth rate of 26%. While small farms in Mediterranean countries account for the majority of conversions to organic farming, Italy represents nearly one-third of all organic farms in the EU. Other predominant organic food producers include Germany, Austria, Spain, and Sweden.

Although French production of organic food has increased significantly in recent years, demand continues to exceed domestic production. In fact, French imports of organic food have increased by 20% annually, reaching 30 000 tonnes in 1998. Leading organic food imports include grains for animal feed, milk, honey, jams, juices, spices and other assorted processed foods.

Outside of the EU, the United States will provide the greatest competition for Canadian organic producers. U.S. organic foods face similar tariffs, duties and transportation costs as those produced in Canada.

Canadian Position

In 1997, Canadian organic food exports to France were estimated at 20,000 tonnes. The most promising opportunities for Canadian exporters involve the sale of bulk or raw

materials for further processing in France. Generally, unprocessed foods are subject to lower tariff rates than processed foods and therefore represent a greater opportunity for Canadian exporters.

Competitive Advantage Through Canadian Government Policies and Initiatives

Export Development Corporation

Export Development Corporation (EDC) offers export financing and insurance to Canadian exporters. Additionally, insurance can be provided for larger transactions that are subject to the terms and conditions established by the buyer. EDC prefers to work through letters of credit, bank credits or bank guarantees. Approval for financing will be considered on a case-by-case basis.

Canadian Commercial Corporation

The Canadian Commercial Corporation (CCC) gives Canadian companies access to financing and better payment terms under the Progress Payment Program (PPP). The PPP concept was developed as a partnership between major Canadian financial institutions and CCC. It enables the exporter's bank to open a project line of credit for the exporter's benefit, based on CCC approval of the project and the exporter's ability to perform.

Program for Export Market Development

The Program for Export Market Development (PEMD) is the federal government's primary international business development program. The objective of PEMD is to increase export sales of Canadian goods and services by sharing the costs of activities that companies normally could not or would not undertake alone, thereby reducing risks involved in entering a foreign market. The PEMD refundable contribution is a minimum of $5,000 and a maximum of $50,000. Preference is given to companies with annual sales greater than $250,000 and less than $10 million, or with less than 100 employees for a firm in the manufacturing sector and 50 in the service industry. Eligible activities, the costs of which are shared on a 50/50 basis, include market visits, trade fairs, incoming buyers, product testing for market certification, legal fees for marketing agreements abroad, transportation costs of offshore company trainees, product demonstration costs, promotional materials, and other costs necessary to execute the market development plan (other components of the program deal with international bid preparation under Capital Project Bidding, and with trade associations when developing international marketing activities for their membership). For additional information visit http://www.infoexport.gc.ca/pemd-e.asp or call 1-888-811-1119.

WIN Exports

Exporters can register their companies with WIN Exports, a database of Canadian exporters and their capabilities. This database is used by trade commissioners around the world and by Team Canada partners in Canada to match Canadian suppliers with foreign business leads and to share information on trade events. For more information, visit: http://www.infoexport.gc.ca/winexports/menu-e.asp or call 1-888-811-1119.

Agri-Food Industry Market Strategies

The Agri-food Industry Market Strategies (AIMS) program of the federal government encourages and assists industry associations to develop strategic marketing and promotional plans for target countries. AIMS also co-ordinates the financial assistance needed to carry out the strategies at a national association level. For more information, visit: http://www.agr.ca/progser/aafaims.html

Agri-Food Trade 2000

Agriculture and Agri-food Canada's "Agri-Food Trade 2000" program is designed to help the Canadian agri-food industry increase sales of agriculture, food and beverage products in both domestic and foreign markets. The program targets agriculture and agri-food producers, processors and exporters who are working collectively through associations, marketing boards or alliances.

MARKET LOGISTICS

Channels of Distribution

France is estimated to have nearly 7200 supermarkets and hypermarkets, which together account for roughly 45% of total organic food sales. Health food stores and open air markets are the second-largest retailers of organic foods, accounting for 35% of sales, while other small retailers and direct sales account for the remaining portion of sales.

Health food stores dominated organic food sales as recently as 1995. Specialized stores such as Rayon Verts, Cote Vert, Biocoop and Naturalia were among the leading health food outlets. However, between 1995 and 1997 sales of organic foods through health food stores decreased from 40% to less than 30%, while supermarkets and hypermarkets increased their share of sales from 25% to nearly 40%. Supermarkets and hypermarkets increased their share primarily because they offered organic foods at a lower price than health food stores, giving customers the convenience of purchasing all food items including organic foods in one store.

Carrefour, the second-largest French supermarket chain, currently carries 60 organic foods and represents approximately 3.5% of total French organic food sales. The number of organic foods sold through supermarkets and hypermarkets is anticipated to steadily grow in coming years. As more organic products become available to consumers and prices decrease, supermarkets and hypermarkets are expected to further increase their share of organic food sales.

Distributors and Wholesalers

French wholesalers and distributors are an excellent method through which to introduce a product to the French market. Strict regulations concerning the production/sale of organic foods combined with consumer concerns regarding the use of genetically modified organisms (GMOs) make the use of a distributor or wholesaler a necessary step in accessing the market. As well, distributors are legally bound to ensure that all imported products adhere to the French/EU food regulations. To ensure national distribution, it may be necessary to use more than one distributor or agent.

When seeking the services of a distributor or wholesaler, exporters should consider the relationship that these individuals have with local governments, buyers, and banks; the condition of their facilities; and their willingness and ability to keep inventory. Canadian producers are advised to review the provisions of French/EU law with a qualified lawyer before entering into an agreement with a prospective partner.

Agents and Sales Representatives

Agents are excellent channels through whom to introduce new products into France. While agents solicit business and enter into agreements on behalf of the exporter they are representing, they do not take ownership over the products they sell.

An exporter must weigh a number of factors when selecting an agent, including:

- region(s) covered by the agent;
- reputation;
- product knowledge;
- experience in handling the exported product;
- commission to be paid;
- what (if any) after-sales service is provided;
- track record; and
- size and quality of the agent's staff.

These attributes can best be assessed during a visit to France. Manufacturers should also ensure that responsibilities are clearly defined before entering into a long-term relationship.

Market-entry Considerations

In June 1999, the Canadian Government announced a new National Standard of Canada for Organic Agriculture. The standard outlines the methods which producers must follow in order to have their products considered to be organic. Only products which adhere to the standard will be able to be exported to France. More information on this standard can be obtained by contacting either the Canadian Organic Advisory Board or the Canadian Food Inspection Agency.

Suggested Business Practices

There are major cultural differences that affect virtually every aspect of business relationships. The French business community is one of conservative formality, and in order to establish successful business relationships, Canadian exporters to understand and adapt to French customs.

Attention to detail is key to success in France. Everything from speaking the language to a knowledge of French history and culture can help an exporter establish their products within in the market.

Bureaucracy is a factor in almost all business conducted in France. The French have an keen interest in technicalities and few business people will break with the established hierarchy in order to complete a deal. Canadian exporters will need patience and understanding in order to avoid frustration.

Import Regulations

As an EU member, France follows the Community Integrated Tariff (TARIC) system, which applies duties to all imports from non-EU countries. EU/French import regulations, duties, and tariff-rate quotas serve to limit the range of foreign products entering the market and protect domestic industries. These factors combined with transportation costs and other import costs mean that Canadian products tend to be higher-priced than domestic products. However, even domestically produced organic foods tend to be higher priced than similar conventionally produced foods. Consumer acceptance of higher organic food prices may provide Canadian producers increased opportunities to enter the French market.

Local Standards, Certificates or Registrations

The production, inspection, and labelling of organic agricultural products is regulated by EC Regulation 2092/91. This regulation applies to both processed and unprocessed products of plant origin. Labelling of these foods fall into one of three categories: foods with more than 95% organic ingredients, those with more than 70% organic make-up but less than 95%, and foods with less than 70% organic ingredients. Although there is

currently no amendment that applies to products of animal origin (e.g. meats, eggs, other dairy products), legislation governing these products may be enacted shortly. The use of GMOs is also strictly prohibited by EU regulations.

EC Regulation 2092/91 also makes each country responsible for implementing this legislation. In France, Ecocert, Qualité France, Afaq-Ascert International, Qualité Nord Pas de Calais, and ULASE (Union des Labels Agricoles du Sud-Est) are the only five organizations accredited by the French government to regulate organic food production. These organizations visit producers twice a year to verify that farming and production techniques comply with French/EU organic regulations.

All products that are exported to France must be accompanied by a standard set of shipping documents. Additional documents may expedite the processing of goods at the French border, but due to the complexity of French/EU regulations, Canadian exporters should request any additional information from the importer prior to shipping. It is recommended that Canadian exporters use the services of a French customs broker, importer, agent or distributor to ensure that all essential documentation is correctly prepared and arrives with the shipment. All documents should be completed in both French and English to avoid unnecessary delays.

Commercial Invoice

The commercial invoice serves as a bill to the buyer from the exporter and must accompany every shipment to France. Invoices should be thoroughly checked, since any error or omission can result in delays, fines or even confiscation. Invoices must include the following information:

- place and date of issue;
- names and addresses of importer and exporter;
- detailed description of the merchandise, including identifying marks, quantities (in metric units), numbers and varieties;
- the individual and total value of items being shipped;
- method of shipment;
- all insurance and freight charges; and
- shipper's invoice number and customer's order number.

Exporters should consult with their customs broker to determine how many copies of the commercial invoice should be sent with each shipment, since the number required varies according to the product being shipped. Any promotional information should also be included with the commercial invoice.

Export Declaration Form (Form B-13)

Export shipments valued at $2,000 or greater must be accompanied by an Export Declaration Form. Although exporters are technically responsible, agents, brokers or carriers typically complete and submit the form on behalf of the exporter.

Packing List

A packing list is necessary when multiple packages are shipped, unless the commercial invoice provides the required information. This list should include:

- the number of packages within one case;
- the net, gross and legal weights of each case, and of the total shipment; and
- the volume of individual packages, as well as of the shipment as a whole.

Between four and seven copies of the packing list should be included in any shipment, depending on the product being shipped.

Bill of Lading

The bill of lading is the shipper's recognition of receipt of the shipment. Each shipment may contain a set of bills of lading, one copy of which should be kept on file, while other copies are sent to the importer and customs broker. The bill of lading should include:

- description of the product(s);
- weights and measurements of the packages and their types;
- ports of origin and destination;
- names and addresses of shipper, importer and customs broker;
- any freight or other charge incurred;
- number of bills of lading in the full set; and
- carrier's acknowledgment of receipt "on board" of the goods for shipment.

Depending on the product, it may be necessary for exporters to include storage temperature and requirements on the bill(s) of lading.

Certificate of Origin

A certificate of origin verifies that the goods originate in Canada, and are therefore subject to all duties or taxes that apply to Canadian products.

Packaging and Labelling

It is recommended that Canadian exporters examine both French and EU regulations regarding packaging and labelling standards. All imported organic food labels must include:

- name of the product;
- what the product is;
- expiry date and any storage requirement;
- product's country of origin;
- alcohol content, by volume (when applicable);
- manufacturer's lot or batch number;
- nutritional information;
- list of ingredients and weights in metric units; and
- list of additives, preservatives, or colouring used.

The French Ministry of Agriculture and Fisheries has developed the Agriculture Biologique (AB) logo, which is included on the label of any food certified by one of the four accredited French agencies. The AB logo certifies that the product adheres to French/EU regulations concerning the production of organic foods and that producers, importers and distributors are registered with an EU member state organic food trade organization. The AB logo is widely recognized by French consumers, who believe that the logo attests to the quality and safety of organic foods.

Authentication of Documents

Documents that need to be authenticated, such as certificates of sale and letters authorizing an exporter's local agent or importer to act on their behalf, must first be notarized in Canada. Exporters can have the notarized documents authenticated, at no cost, by sending them to the Department of Foreign Affairs and International Trade, Authentication and Service of Documents (JLAC).

Export Credit Risks, Restrictions on Letters of Credit or Currency Controls

France currently implements no restrictions on letters of credit or currency controls.

Generally, the method of payment is a matter for negotiation between the individual supplier and importer. Usual practice is for payment to be made by terms of a letter of credit for 30 to 60 days. In cases where distribution arrangements are concluded, exporters are advised to prepare a contract detailing all major points of agreement, rights, and responsibilities.

PROMOTIONAL EVENTS

Event / Description	Organizer
Dietexpo Paris Expo - Porte de Versailles Paris, France October 2001 International exhibition of health, organic food and natural cosmetics.	Reed Exhibition Companies 383 Main Avenue Norwalk, CT 06851 Tel.: (203) 840-5570 Fax: (203) 840-9570 E-mail: dietexpo@reed-oip.fr Internet: http://www.reedexpo.com/
Europain Paris, France February 2002 15th World bakery, patisserie and catering exhibition.	Promosalons Canada 1200 Bay St., Suite 503 Toronto, ON M5R 2A5 Tel.: (416) 929-2562 or (800) 565-4443 Fax: (416) 929-2564 E-mail: info@promosalons.ca Internet: http://www.europain.com/
Vinexpo Bordeaux-Lac Exhibition Centre Bordeaux, France 2001 International wine and spirit exhibition.	VINEXPO 9 Cours du Chapeau Rouge BP 104 - 33024 Bordeaux Cedex, France Tel.: (33 5) 56 56 00 22 Fax: (33 5) 56 56 00 00 Internet: http://www.vinexpo.fr/99/
SIAL 2000 Paris Nord Villepinte Exhibition Center Paris, France October 22-26, 2000 International food and beverage exhibition.	Promosalons Canada 1200 Bay St., Suite 503 Toronto, ON M5R 2A5 Tel.: (416) 929-2562 or (800) 565-4443 Fax: (416) 929-2564 E-mail: info@promosalons.ca Internet: http://www.sial.fr/index.htm
Vivez Nature Cité des Sciences et de L'industrie Centre des Congrès de la Villette Paris, France April 2000 Organic food exhibition.	Vivez Nature 1 place paul verlaine 92100 boulogne billancourt Tel.: (33 3) 86 78 19 20 Fax: (33 3) 86 78 19 21

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International Trade Centres

For export counselling or publications for Canadian exporters, please contact your local International Trade Centre by calling 1-888-811-1119.

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OECP Editions
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Internet Sites

Agriculture and Agri-Food Canada, Agri-Food Trade Service: **http://ats.agr.ca/**

Bank of France: **http://www.banque-france.fr/**

Canadian Food Inspection Agency: **http://www.cfia-acia.agr.ca**

Canadian Organic Growers: **http://www.gks.com/cog/**

Centre of International Cooperation on Agricultural Development Research: **http://www.cirad.fr/**

Department of Foreign Affairs and International Trade: **http://www.dfait.maeci.gc.ca**

EU Council Regulation No. 2092/91: **http://europa.eu.int/comm/sg/consolid/en/391r2092/artm.htm**

European Network for Scientific Research Coordination in Organic Farming: **http://www.cid.csic.es/enof/index.html**

ExpoGuide: **http://www.expoguide.com**

ExportSource: **http://exportsource.gc.ca**

French Trade Offices in Canada: **http://www.dree.org/canada/**

InfoExport: **http://www.infoexport.gc.ca**

International Federation of Organic Agriculture Movements: **http://www.ecoweb.dk/ifoam/**

Ministry of Agriculture and Fisheries (France): **http://www.agriculture.gouv.fr/index.htm**

Ministry of Economy, Finance and Industry (France): **http://www.finances.gouv.fr/**

Ministry of Foreign Affairs (France): **http://www.diplomatie.gouv.fr/**

Organic Crop Improvement Association: **http://www.ocia.org/**

Strategis: **http://strategis.ic.gc.ca**

Tradeport: **http://www.tradeport.org**

Trade Show Central: **http://www.tscentral.com**